

Employee Post-Travel Disclosure of Travel ExpensesRECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS**Post-Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

2019 NOV 21 PM 4: 22

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The original *Employee Pre-Travel Authorization* (Form RE-1), AND
- ☒ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Heritage FoundationTravel date(s): October 10-11, 2019Name of accompanying family member (if any): NoneRelationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$100.00 - 32 passenger coach bus	\$96.00	\$93.15	\$5.00 - George C Marshall Museum ticket
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	None	None	None	None
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): This trip included a tour of the George C. Marshall Research library and a full simulation of

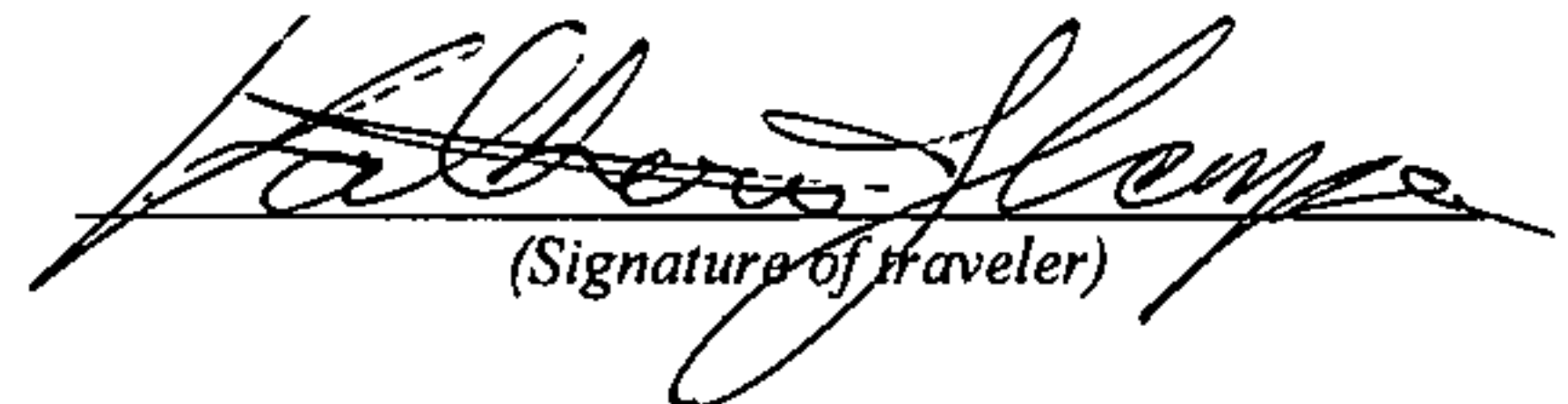
the Yalta Conference run by the Virginia Military Institute.

10/24/2019

(Date)

Katherine Thompson

(Printed name of traveler)



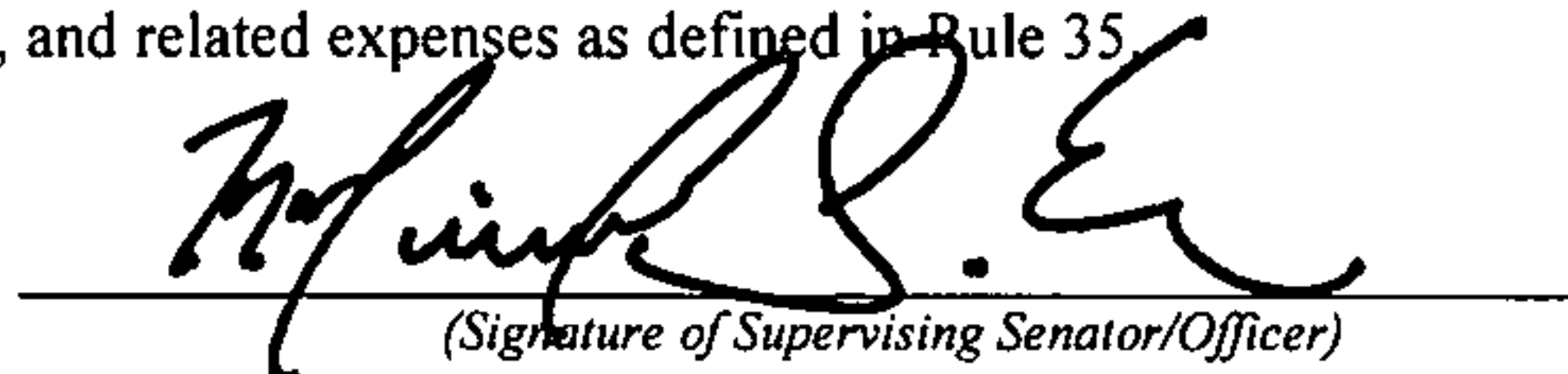
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/24/2019

(Date)



(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

ETHIC SEP 9'19PM 4:31

Name of Traveler: Katherine Thompson

Employing Office/Committee: Senator Mike Lee

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): Thursday, October 10th, 2019-Friday, October 11th, 2019

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Lexington, VA

Explain how this trip is specifically connected to the traveler's official or representational duties:

This trip to the Virginia Military Institute will provide an immersive national security and diplomacy exercise through a simulation of the Yalta conference that will further my ability to advise and support Senator Lee in the foreign policy/military space.

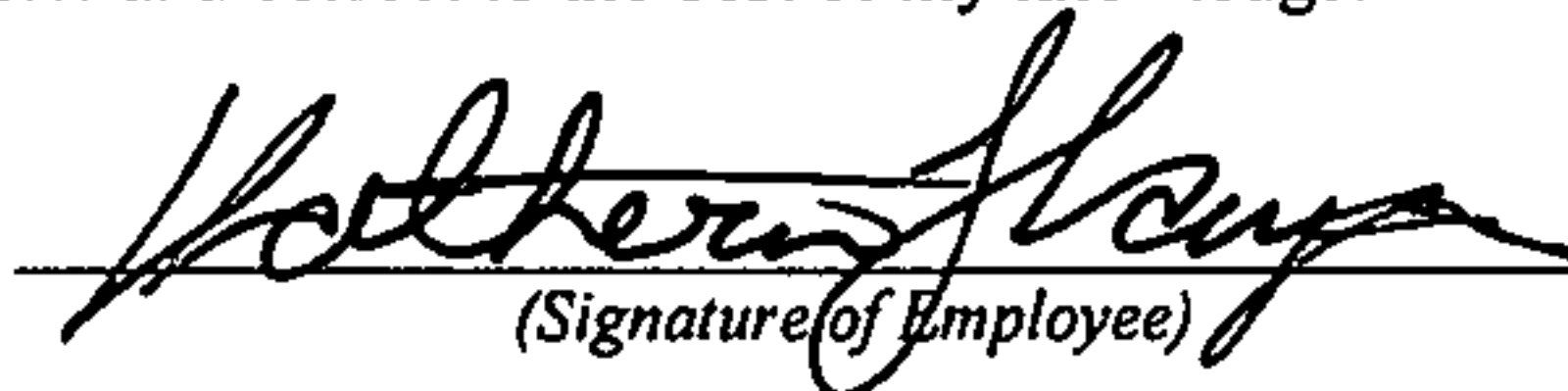
Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

09/09/2019

(Date)


(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Senator Mike Lee

Katherine Thompson

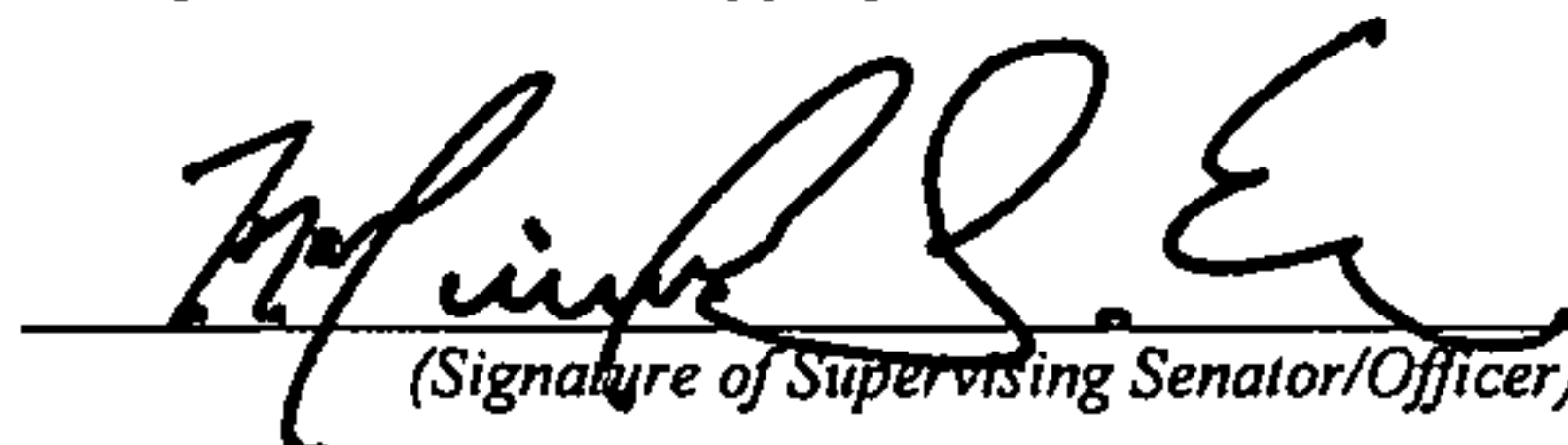
I, _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

09/09/2019

(Date)


(Signature of Supervising Senator/Officer)

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The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

- Private Sponsor Certification - Page 1 of 4

9. USE ONLY IF YOU CHECKED QUESTION 6(B)

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

=OR=

=OR=

10. USE ONLY IF YOU CHECKED QUESTION 9(B)

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

See attached.

See attached.

The Heritage Foundation has a long history of sponsoring congressional travel including trips to the historic Gettysburg battlefield, the Virginia Military Institute, and the National Museum of the Marine Corps at Quantico.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Heritage Foundation conducts public policy research, publishes educational reports, and provides public seminars to promote discussion of ways to further our mission. Heritage also has staff throughout the country to meet with citizens regarding issues that are being debated in government today.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$100.00 - 32 passenger coach bus	\$96.00	\$100.00 - Lunch, Dinner, Breakfast, Lunch	\$5.00 - George C. Marshall Museum ticket

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip involves an event that is organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

See attached.

19. Name and location of hotel or other lodging facility:

Hampton Inn

401 E Nelson St, Lexington, VA 24450

20. Reason(s) for selecting hotel or other lodging facility:

The Hampton Inn is close to the Virginia Military Institute and is able to host our group for a reasonable price compared to the other options.

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17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip involves an event that is organized specifically with regard to congressional participation.

- 18. Reason for selecting the location of the event or trip**

See attached.

19. Name and location of hotel or other lodging facility:

Hampton Inn

20. Reason(s) for selecting hotel or other lodging facility:

The Hampton Inn is close to the Virginia Military Institute and is able to host our group for a reasonable price compared to the other options.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The expenses for meals are below the per diem rate, and the expenses for lodging are equal to the per diem rate.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

A 32-passenger coach bus has been chartered.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None provided.

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:

Name and Title: Thomas Binion, Vice President of Government Relations

Name of Organization: The Heritage Foundation

Address: 214 Massachusetts Ave NE, Washington, D.C. 20002

Telephone Number: 202-608-6188

Fax Number:

E-mail Address: thomas.binion@heritage.org

Nic Adams, National Security Advisor, Office of Senator Joni Ernst
Katherine Thompson, Legislative Correspondent, Office of Senator Mike Lee
Michael Callesen, Policy Advisor, Senate Foreign Relations Committee
Aaron Strickland, Deputy Military LA, Office of Senator Lindsey Graham

13) We are hosting this trip as per our mission to formulate and promote conservative public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense. This trip is to further educate the attendees on national security lessons of the past, and how attendees can apply these national security policy lessons to strategic leadership and grand strategy today.

18) Each year, The Heritage Foundation's Marshall Fellowship goes to the Virginia Military Institute where it conducts a diplomacy exercise with a group of VMI cadets. The Virginia Military Institute was selected due to its rich history and access to military experts and is an ideal place to utilize as a national security policy education and diplomacy exercise site.

Thursday – Friday, October 10-11, 2019
The Marshall Foundation, Lexington, VA

10:00 a.m.	Meet and Load Luggage	Heritage Lobby
10:30 a.m.	RMA Bus Departs from Heritage	
10:30 – 2:00 p.m.	Travel to Lexington, Virginia	
12:00 p.m.	Stop at Subway for Lunch 491 W Reservoir Rd. Woodstock, VA	
2:00 – 3:30 p.m.	Arrive at Marshall Museum for Tour <i>1600 VMI Parade, Lexington, VA</i> <i>*This helps participants understand the significance of General George Marshall and his contribution to establishing American grand strategy; especially during the historical time period in which the Yalta Conference took place.</i>	
3:30 p.m.	Museum Tour Ends/Depart for the Hampton Inn & Check-in <i>Hampton Inn, 401 E Nelson St, Lexington, VA 24450</i>	
4:15 p.m.	Bus will take Fellows back to The Marshall Museum <i>1600 VMI Parade, Lexington, VA</i>	
4:30 – 6:00 p.m.	Fellows meet with Cadets on campus to discuss strategies for the simulation. Depart for Dinner at Southern Inn Restaurant. <i>*The participants will meet with the VMI cadets for the first time in order to begin their preparations for Friday's simulation event. Each cadet will then present his/her academic project that relates to the historical context of the 1945 Yalta Conference (e.g. an analysis of German war reparations, the partitioning of Poland, etc).</i>	
6:00 p.m.	Reception/Dinner at Southern Inn Restaurant <i>37 South Main Street, Lexington, VA 24450</i>	
6:30 p.m.	Dinner <i>*Professor Dennis Foster, VMI faculty member, will give remarks setting the context for the Yalta Conference Simulation occurring the next day. Cadets from VMI will join the dinner and discussion.</i>	
8:00 p.m.	Dinner Concludes - Fellows/Cadets can choose to continue meeting or adjourn for the evening	

7:00 a.m.	Breakfast and Check-out	Hampton Inn
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Subject: 2019 George C. Marshall Fellowship
Date: Thursday, February 7, 2019 at 12:50:11 PM Eastern Standard Time
From: Palumbo, Brandon on behalf of Spoehr, Thomas
To: [REDACTED]
CC: Thompson, Katherine (Lee)
Attachments: 2019 Marshall Fellowship Calendar.pdf

Dear Katherine,

Congratulations! It is with great pleasure that we accept you into the George C. Marshall Fellowship Class of 2019.

The fellowship will commence on **Friday, March 22nd** with an orientation session at The Heritage Foundation's 227 Pennsylvania Avenue SE building. Attached you will find the 2019 calendar of events. Through your acceptance, you are agreeing to attend all sessions and trips. For Congressional and Senate staff, we will contact you directly to provide you with all forms necessary for Ethics Committee compliance on all trips.

If you have any questions or concerns, please do not hesitate to reach out to Brandon Palumbo at brandon.palumbo@heritage.org or at 202-675-1784.

Congratulations again, and we look forward to welcoming you into the Marshall Fellow community!

Sincerely,

Thomas Spoehr
Director, Center for National Defense
The Heritage Foundation
214 Massachusetts Avenue, NE
Washington, DC 20002
202-608-6074
heritage.org